

**State Procurement Office
Procurement of Health and Human Services**

**The Health and Human Services
Contracts Database Reporting System (CDRS)
Handbook**

Table of Contents

Introduction.....	1
What Must be Reported on the CDRS.....	1
Submittal Deadlines for Reporting	2
Terminology.....	2
Obtaining a Log-in and Password.....	3
Connecting to the CDRS Website.....	4
Reporting a New Contract	4
Updating or Editing Contract Information.....	14
Reporting Funding in Subsequent Fiscal Years.....	15
Reporting Actual Expenditures.....	16
Reporting Major Accomplishments of a Contract.....	17
Uploading Attachments	17
The Public Site.....	18
Summary of Updates to the CDRS Handbook	20

The CDRS was developed with the assistance of the Department of Accounting and General Services, Information and Communication Services Division.

This handbook is available on the on the State Procurement Office website and will be updated as needed. Please check for updates.

www.spo.hawaii.gov > **Health and Human Services** > **For State Agencies**.

Questions or Comments? Contact:

Mara Smith at 587-4704 ~ mara.smith@hawaii.gov or

Corinne Higa 587-4706 ~ corinne.y.higa@hawaii.gov

Introduction

The Contracts Database Reporting System (CDRS) enables purchasing agencies to report all purchases of health and human services as they are developed. The CDRS removes the extra effort in annually consolidating and reporting data accurately for hundreds of purchases. The CDRS will increase efficiency and accuracy and produce reports reflecting the most current information. Purchasing agencies, community members and other interested parties will utilize the data in planning and prioritizing for services.

What Must be Reported on the CDRS

All purchases of health and human services (see terminology) shall be reported regardless of method of procurement or form of agreement.

Method of Procurement

- Competitive purchases (RFPs, secondary purchases, etc.)
- Restrictive purchases
- Treatment purchases
- Crisis purchases
- Small purchases
- Purchases of health and human services exempt from Chapter 103F, HRS.

Form of Agreements

- Formal contracts
- Memorandums of agreement or understanding (MOA or MOU)
- Purchase orders, etc.

Data to be Reported. For specifics, read this manual. In summary:

	Page
• Purchasing agency (Department/Division/Branch/Program/Office)	6
• Contact information (name, phone, e-mail, etc.)	13
• Contract ID (contract number, PO number, etc.), service title and brief description	6
• Method of Procurement and ID (RFP No., RH No, PEH No., etc.)	8
• Provider	7
• Geographic area, general and special populations served	7
• Funding by fiscal year and source of funds (contracted and actual expenditures)	10
• Method of compensation and payment	12
• Major accomplishments of the contract	17

Submittal Deadline for Reporting

Information for Fiscal Year 2005

For all contracts or other agreements active as of July 1, 2004 and all contracts executed between July 1, 2004 and May 31, 2005 relevant information shall be reported by June 6, 2005. Amendments, funds actually expended and accomplishments shall be submitted by the deadlines below.

For all contracts or other agreements executed on or after June 1, 2005:

Data	Deadline
New contracts, MOAs, MOUs, etc	5 working days of execution
Purchase Orders	5 working days of issuance
Amended information (contract extensions, changes in funding, etc.)	5 working days of execution of addenda or supplemental agreement
Funds actually expended	60 days of close of fiscal year and 90 days of contract expiration
Major Accomplishments	90 days of contract expiration (may also be reported at the end of each fiscal year)

Terminology

Agency: Any department, authority, commission, council, board, committee, institution, legislative body, agency, or other establishment or office of the executive, legislative, or judicial branch of the state, and includes the Office of Hawaiian Affairs.

Contract: All types of agreements, regardless of what they may be called.

Note: **Contract** will be used in this handbook to mean all forms of agreements; formal contracts, purchase orders, memorandums of agreement or understanding, etc.

Contract amendment: Any written alteration of scope of services, time of delivery, payment terms, amount of payment, or other provisions of any contract accomplished by mutual action of the parties to the contract.

Health and human services: Services to communities, families, or individuals which are intended to maintain or improve health or social well-being through methods including, but not limited to:

- (a) Assessment, treatment, diagnosis, prevention, and education services provided directly to a target clientele; or
- (b) Insurance coverage for assessment, treatment, diagnosis, prevention, and education services to be provided to a target clientele.

Provider: An organization or individual contracted by an agency to provide health or human services.

Log-in: the name used in conjunction with the password when signing in to the website. It is also referred to as the login ID, user or username.

Obtaining a Login ID and Password

To enter the CDRS, obtain a login identification (or login ID) and password from the State Procurement Office (SPO).

1. Open your browser and go to www.spo.hawaii.gov.
2. Click **Health and Human Services**.
3. Click **For State Agencies**.
4. Click **Obtain a Password for the Contracts Database Reporting System (CDRS)** or scroll down to **Passwords**.
5. Click **request a password**. An e-mail will open.
6. In the e-mail subject line enter: *CDRS login/password*.
7. In the body of the e-mail provide the following information:
 - a. First and last name
 - b. Department, Division, Branch, Program/Office
 - c. e-mail address
 - d. Phone number
 - e. Login ID (maximum of 10 alphanumeric characters)
 - f. Password (maximum of 20 alphanumeric characters)

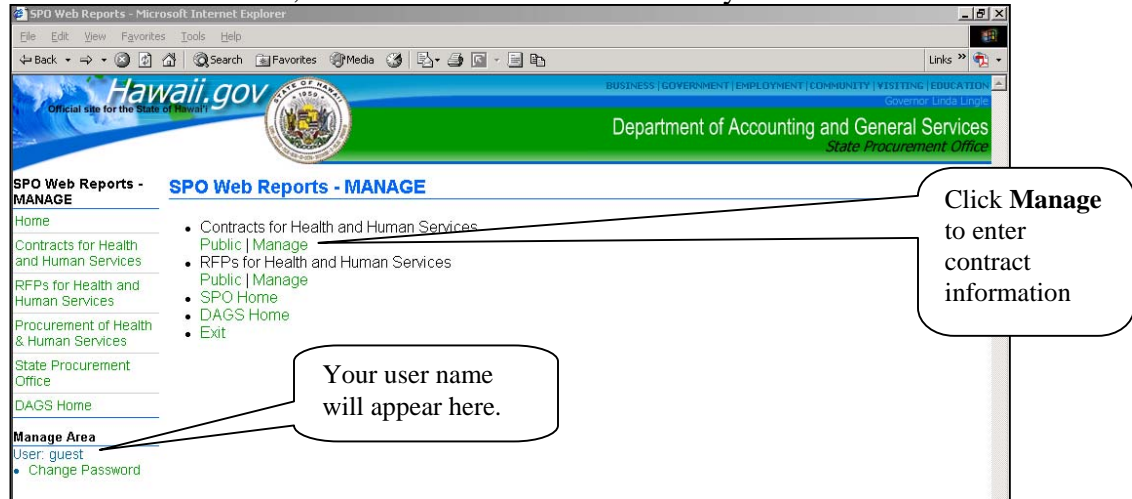
Note: If your agency currently has a login ID and password for the RFP website (RFPW) use the same the same login/password. You do not need to request another one.

If your agency currently has a login ID for other data entry such as the Procurement Notices System (PNS), the same login ID and password may be used. If you would like to do this, make note of it in the message body. You must make the request (for the same login and password) to activate your password for the CDRS.

8. Send the e-mail.
9. When activated, an e-mail will be sent to the e-mail address identified in the request.

Connecting to the CDRS Website

1. Open your browser and go to www.spo.hawaii.gov, click **Health and Human Services > For State Agencies > Health and Human Services Contracts Database > Log-in > Log in**.
2. Enter your user name (log-in ID) and password.
3. Press enter or click **Log In**.
4. Click **Manage** under Contracts for Health and Human Services. You will see a page similar to Figure 1. From this page you can enter new contracts, amend contract information, list or search contracts entered by the user.

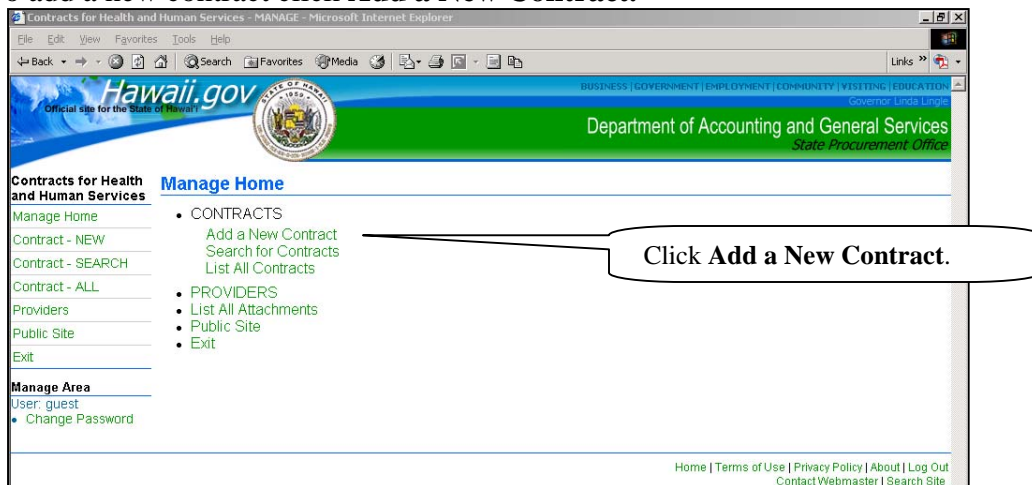


(Figure 1 - Managing Contracts and RFPs)

Note: this page may be used to access both the Health and Human Services RFP website (RFPW) and the Contracts Database Reporting System (CDRS). Click **Manage** to enter, delete, edit data or upload a file. Click **Public** to view the site open to the public or search the entire database.

Reporting a New Contract

1. To add a new contract click **Add a New Contract**.



(Figure 2- Managing Contracts)

2. A page will appear with the following text:
“You are about to create a new Contract. Do you want to proceed?”
3. Click **Yes**.
4. Depending on the screen resolution and the size of your monitor, you will either see a page similar to Figure 3 (on page 6), or you will see a page with the left-hand menu and an empty center section.
5. If the center of the screen is blank, scroll down and the rest of the information will appear below the left hand menu.

The **Contract Data Entry Form** consists of 4 pages.

Page 1 General Information and Demographics

Page 2 Method of Procurement

Page 3 Funding Information

Page 4 Method of Compensation and Payment, Contact Information, General
Comments, and Major Accomplishments of the Contract

Icons Used in the Contract Data Entry Form



Edit (blue)



Upload (green)



Download (green)



Delete (red)

Contract Form - Page 1 (General Information and Demographics)

(Figure 3 -- General Information and Demographics)

1. **Contract (or PO) Number:** Enter the contract or purchase order number.
 - a. For formal contracts, enter the full contract number (ex: DHS_05_QXY_4456 or YO_05_1234). Use underscores instead of spaces.
 - b. If the purchase is less than \$25,000 and a purchase order (PO) is used, enter the full PO number.
 - c. For memorandums of agreement/understanding enter an alphanumeric identifier.
2. **Department:** Select the department from the dropdown list. After selecting the department, the screen will appear to change or blink. It is selecting the divisions associated with the department selected.
3. **Division:** Select the division or administratively attached office from the dropdown list.

4. **Branch/Office:** Enter the Branch/Office/Program as appropriate. Be sure to enter it the same way each time a contract is entered. If the same branch/office is not entered the same way each time, it will be difficult to keep track.
5. **Provider:** Select a provider from the provider list.
 - a. Select the provider.
 - b. If the provider is an individual/sole proprietor, the listing will be by last name.
 - c. Do NOT select “add a provider” if a provider name is on the list!

Hint: This is a long list. To decrease scrolling, place your cursor in the box and type the first letter of the provider name. It will scroll to the first provider beginning with that letter.

- d. If the provider is not on the list, click **Add Provider** and add the provider name.
 - i. If the provider is an individual, enter in the format
lastname, firstname, academic degree/title (e.g.: Doe, John, M.D.)
6. **Service:** Enter the service title. The title should identify the service. For instance, “Mental Health Services” is too general. “Outpatient Mental Health Services for Dual Diagnosis Patients” is better. Do not use acronyms!
7. **Description:** Enter a brief description of the service. Do not use acronyms.
8. **Geographic areas:** Check the island(s) where services are provided. You may clarify further in the service description or **Comments** on page 4 of the form.
 - a. Do not check “statewide” unless all islands are served.
 - b. If “statewide” is checked, do not also check an island.
9. **Target Populations:** Check the age group(s) served.
 - a. If a contract serves part of the population, check it. For instance, if a contract serves children ages 2 to 4, check “0-2” and “3-4.” You may clarify further in the service description or **Comments** on page 4.
 - b. Do not check “all” unless the target population includes everyone.
 - c. If “all” is checked, do not also check another population.
10. **Special Population:** Enter the special population, if applicable. If there is no special population, leave it blank.
11. **Start Date:** Enter the start date of the contract.
 - a. Use the *mm/dd/yyyy* format.
 - b. If the start date is upon notice to proceed enter the notice to proceed date.
12. **End Date:** Enter the end date of the contract. Use the *mm/dd/yyyy* format. You will change the end date later if the contract is extended.
13. **Possible extensions to:** If the contract has an option to extend enter the last possible date to which the contract may be extended. Use the *mm/dd/yyyy* format.
14. Click **Save and Go to Page 2**. You will see a page similar to Figure 4.

Contract Form Page 2 (Method of Procurement)

1. Click **Add New**. The Method of Procurement and Number Form will appear. (Figure 4)

Contracts for Health and Human Services - MANAGE - Microsoft Internet Explorer

Hawaii.gov
Official site for the State of Hawaii

Department of Accounting and General Services
State Procurement Office

Contracts for Health and Human Services

Contract Form - Page 2

Contract(or PO) Number: DHS_05_OYS_1234

Click Add New.

Method Procurement Number

Add a Method of Procurement to continue

Manage Home
Contract - NEW
Contract - SEARCH
Contract - ALL
Providers
Public Site
Exit

Manage Area
User: administrator
Change Password
Utilities

Home | Terms of Use | Privacy Policy | About | Log Out
Contact Webmaster | Search Site

(Figure 4 – Adding the Method of Procurement)

Contracts for Health and Human Services - MANAGE - Microsoft Internet Explorer

Hawaii.gov
Official site for the State of Hawaii

Department of Accounting and General Services
State Procurement Office

Contracts for Health and Human Services

Method of Procurement and Number Form

Contract Number: DHS_05_OYS_1234

Method of Procurement: Competitive

RFP, PEH or RH Number, as applicable: HMS-504-05-12

Save & Go Back to Page2 Reset

Manage Home
Contract - NEW
Contract - SEARCH
Contract - ALL
Providers
Public Site
Exit

Manage Area
User: administrator
Change Password
Utilities

(Figure 5 – Entering the Method of Procurement)

2. Select the **Method of Procurement** from the dropdown box.
 - a. Select **Competitive-RFI** when contracts are procured pursuant to section 3-143-614, HAR.
 - b. Select **Competitive – After the Fact Secondary Purchase** when an after-the-fact Secondary Purchase had been requested from the chief procurement officer. For the number, enter the RFP number of the primary purchasers RFP.
 - c. For planned secondary purchases, enter **Competitive -RFP** as the method of procurement and the RFP number. On page 4 of the contract form, enter “This is a planned secondary purchase” in **Comments**.
3. Enter the **number** as applicable. Use underscores instead of spaces.
 - a. For restrictive, exempt, after-the-fact secondary and crisis purchases: Enter the request number.

Note: For the executive branch, the request number is located in the lower right corner. Requests are on the SPO Health and Human Services website in [Awards](#).

- b. For contracts entered into as a result of an RFI pursuant to section 3-143-614, HAR, enter the date of the RFI in the format *mm_dd_yy*.
 - c. For contracts with other government agencies, enter “103F_a_2”.
 - d. For contracts to award grants and subsidies pursuant to Chapter 42F, HRS, enter “42F”.
 - e. For other contracts exempt pursuant to a statute or administrative rule, enter the statute or administrative rule. Use underscores instead of spaces. Omit commas.
4. Click **Save and Go Back to Page 2**. You will see a summary of the information. (Figure 6)

Contracts for Health and Human Services - MANAGE - Microsoft Internet Explorer

Hawaii.gov
Official site for the State of Hawaii

Department of Accounting and General Services
State Procurement Office

Contract Form - Page 2
Contract(or PO) Number: DHS_05_OYS_1234

Add New


Method Procurement	Number
<input checked="" type="checkbox"/> Competitive	hms_05_OYS_12

Go to Page 3
Skip To Page: 1 | 2 | 3 | 4

If you need to modify information, click the blue edit icon.

Home | Terms of Use | Privacy Policy | About | Log Out
Contact Webmaster | Search Site
Copyright © 2005 State of Hawaii - All rights reserved.

(Figure 6 - Method of Procurement Summary)

5. If the information is incorrect, you may modify it by clicking the blue edit icon. 
6. Click **Go to Page 3**. (Figure 7)

Contract Form Page 3 (Funding Information)

1. Click **Add New**. A page similar to Figure 8 will appear.

Contracts for Health and Human Services - MANAGE - Microsoft Internet Explorer

Address: http://www.hawaii.gov/dev-dags/spo/contracts/manage/3contract_form.php?contractID=62

Hawaii.gov
Official site for the State of Hawaii

Department of Accounting and General Services
State Procurement Office

Contracts for Health and Human Services

Contract Form - Page 3
Contract (or PO) Number: DHS_05_OYS_1234

Click Add New.

Add New

Fiscal Year	FUNDS CONTRACTED				Are Funds Listed as Contracted an Estimate?	FUNDS ACTUALLY EXPENDED				Comments
	Federal	General	Special	Total		Federal	General	Special	Total	
*Funds listed as contracted are an estimate because the services are 'as needed' and the contract does not list a total amount.										
Add funding amounts to continue										

Home | Terms of Use | Privacy Policy | About | Log Out
Contact Webmaster | Search Site
Copyright © 2005 State of Hawaii - All rights reserved.

(Figure 7 - Adding Funding)

Funding information shall be reported by **fiscal year** and **source of funding**.

1. **Fiscal year:** Select the contract fiscal year.
For most contracts with general (state) funds, the contract fiscal year will begin July 1 and end June 30. Some federally funded contracts may begin on October 1 and end September 30.

If the contract begins on a date other than July 1 or October 1, enter the amount for the remainder of the current fiscal year, then enter the amount for each succeeding fiscal year.

2. **Federal, General and Special Funds Contracted (or estimated):** Enter the funds contracted for the year. Do not use commas. It is not necessary to enter zero when a particular source of funding is zero.

If the contract does not have an amount funded by fiscal year, enter an **estimate**. You may amend it at any time. Check the box indicating the amount is an estimate. You may enter an explanation in **Comments** located on this page.

FAQ: Why do we have to enter an estimate?

It is important to enter funding for each fiscal year the contract is funded. Various parties will utilize this database for analysis and planning to determine future funding.

3. **Federal, General and Special Funds Actually Expended:** Funds actually expended will, of course, be entered at the close of the fiscal year. Actual expenditures shall be reported within 60 days after the close of the contract fiscal year and 90 days after the contract expires. (See page 15.)
4. **Comments:** As applicable, use **Comments** to enter any explanations or clarifications of funding information for the fiscal year.

5. Click **Save**.

Contracts for Health and Human Services - MANAGE - Microsoft Internet Explorer

Address: http://www.hawaii.gov/dev-dags/spo/contracts/manage/funds_form?contractID=62

Hawaii.gov Official site for the State of Hawaii

Department of Accounting and General Services
State Procurement Office

Contracts for Health and Human Services

Manage Home
Contract - NEW
Contract - SEARCH
Contract - ALL
Providers
Public Site
Exit

Manage Area
User: administrator
Change Password
Utilities

Funds Form

Fiscal Year: 2005

Federal Funds Contracted:

General Funds Contracted:

Special Funds Contracted:

Check if the contract does not include total funding by year and this is an estimate. Explain in Comments: ☐

Federal Funds Actually Expended:

General Funds Actually Expended:

Special Funds Actually Expended:

Comments:

Save Reset

Check here if the amount(s) entered is an estimate.

(Figure 8 –Entering Funding Information by Fiscal Year)

6. The next page (Figure 9) will show a funding summary. If the data needs to be changed, click the blue edit icon beside the fiscal year.

7. Click **Go to Page 4**.

Contracts for Health and Human Services - MANAGE - Microsoft Internet Explorer

Address: http://www.hawaii.gov/dev-dags/spo/contracts/manage/contract_form.php?contractID=62&fundadded=1

Hawaii.gov Official site for the State of Hawaii

Department of Accounting and General Services
State Procurement Office

Contracts for Health and Human Services

Manage Home
Contract - NEW
Contract - SEARCH
Contract - ALL
Providers
Public Site
Exit

Manage Area
User: administrator
Change Password
Utilities

Contract Form - Page 3
Contract(or PO) Number: DHS_05_OYS_1234

Add New

Fiscal Year	FUNDS CONTRACTED				Are Funds Listed as Contracted an Estimate?	FUNDS ACTUALLY EXPENDED				Comments
	Federal	General	Special	Total		Federal	General	Special	Total	
2005	\$200,500	\$0	\$0	\$200,500	No	\$0	\$0	\$0	\$0	

*Funds listed as contracted are an estimate because the services are 'as needed' and the contract does not list a total amount.

Go to Page 4
Skip To Page: 1 | 2 | 3 | 4

Click the blue edit icon to amend the data.

Home | Terms of Use | Privacy Policy | About | Log Out
Contact Webmaster | Search Site
Copyright © 2005 State of Hawaii - All rights reserved.

(Figure 9 – Funding Information Summary)

Contract Form Page 4 (Method of Compensation and Payment, Contact Information, General Comments and Significant Accomplishments)

Contracts for Health and Human Services - MANAGE - Microsoft Internet Explorer

Hawaii.gov
Official site for the State of Hawaii

BUSINESS | GOVERNMENT | EMPLOYMENT | COMMUNITY | VISITING | EDUCATION | GOVERNMENT LEGISLATION

Department of Accounting and General Services
State Procurement Office

Contract Form - Page 4
Contract(or PO) Number: DHS_05_OYS_1234

Method of Compensation & Payment

Method of Compensation: ☐ Cost Reimbursement ☐ Unit Rate ☐ Fixed Price ☐ Other

New Service - Is this a new service for the purchasing agency? Yes: ☐ No: ☒

Modified Service - Is this a significantly modified service from prior solicitations? Yes: ☐ No: ☒

Does this Contract Contain:

Initial Payment - an advance payment that is later reconciled with the method of payment? Yes: ☐ No: ☒

Guaranteed Payment - minimum number of units/referrals for which payment is guaranteed. Yes: ☐ No: ☒

Start-Up Costs - costs to start a new service or significantly modify a service? Yes: ☐ No: ☒ Not a new/significantly modified service: ☐

Contact Information

Contact Person:

Phone:

E-Mail:

Comments:

Significant Accomplishments of this Contract:

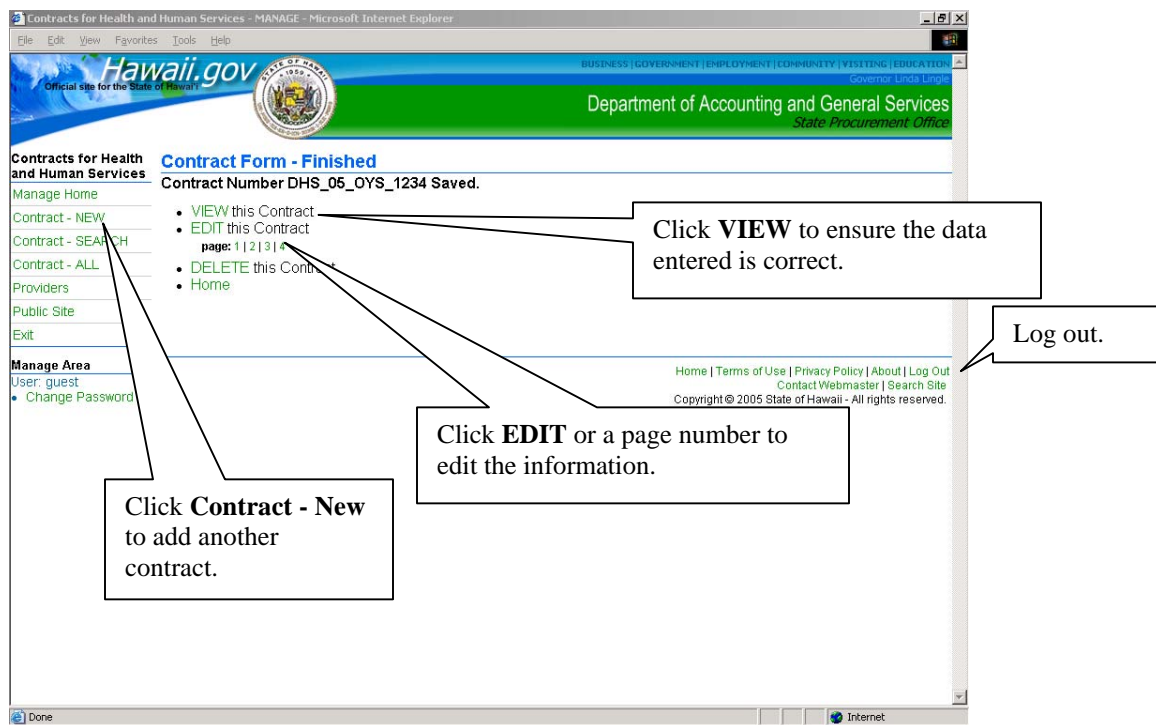
Finish Reset
Skip To Page: 1 | 2 | 3 | 4

(Figure 10 – Compensation & Payment, Contact Info, Accomplishments)

1. **Method of Compensation:** Check only one.
 - a. **Cost reimbursement:** Check if contract payment is to reimburse allowable costs up to a maximum amount.
 - b. **Unit rate:** Check if payment is for units delivered such as a bed day or an hour of service.
 - c. **Fixed price:** Check if contract payment is one price for the entire service/program. An example would be \$75,000 to run an after school program for a year.
 - d. **Other:** Check if the method of payment is not one of the above, is a combination of methods or is cost-plus. Enter a brief explanation in **Comments**.
2. **New or Modified Service:** You may select **yes** for either one, if applicable. Do not select **yes** for both. You may select **no**.
 - a. **New service:** Select **yes** if the purchasing agency has not solicited for this service before.

- b. **Modified service:** Select **yes** if the solicitation for the contract was a major modification from the previous solicitation. Modifications may be in the activities, configuration of services, quantity, geographic area, target group, professional requirements, etc. Factors to be considered in determining whether a modification is significant shall include but are not limited to: increased costs, hiring of a significant number of different staff, need for new or modified facilities.
3. **Initial Payment, Guaranteed Payment or Start-up Costs:** Select **yes** for each one that applies.
 - a. **Initial payment:** Select **yes** if an initial advance payment is made that is later reconciled with actual expenditures or units of service delivered, etc.
 - b. **Guaranteed payment:** Select **yes** if the contract guarantees a minimum payment or payment for a minimum number of service units of regardless of whether referrals are made, units/services are actually delivered.
 - c. **Start-Up Costs:**
 - i. Select **yes** if additional costs for starting a new or significantly modified service/program are paid. For instance, a new residential program may be paid additional funds to open/refurbish a facility or a program is paid additional funds to open a facility in a new location. Start-up costs may also be reflected in a unit rate that is higher for the first year than in subsequent years.
 - ii. Select **no** if this is a new or significantly modified program and start-up costs are not paid.
 - iii. Select **Not a new/significantly modified service** if the service is the same or similar to previous solicitations.
4. **Contact Information:** Provide contact information for the state agency personnel responsible for administering the contract.
 - a. **Contact Person:** Enter the first and last name.
 - b. **Phone:** Enter the complete 7 digit phone number. DO NOT enter Area Code or enter a 5 digit number.
 - c. **e-mail:** Enter the complete e-mail address.
5. **Comments:** Enter any additional general information about the contract. This may include an explanation about the method of compensation if it is “other,” clarification of the geographic area or target group, or any information deemed necessary.
6. **Significant Accomplishments.** Significant accomplishments will be entered at the end of the contract/each fiscal year as appropriate. See page 17.
7. Click **Finish**. A page similar to Figure 11 will appear.
8. Click **VIEW**.
9. A new window will appear. Review the contract information and ensure it is correct
10. If any information is incorrect, close the window and go back to the previous page (it will still be open). Click **edit** or the appropriate page number (**Skip to page |1|2|3|4|**).
11. If you wish to enter another contract, click **Contract – NEW**.

12. When data entry is completed and checked for accuracy, click **Log Out**.



(Figure 11 – Contract data entered)

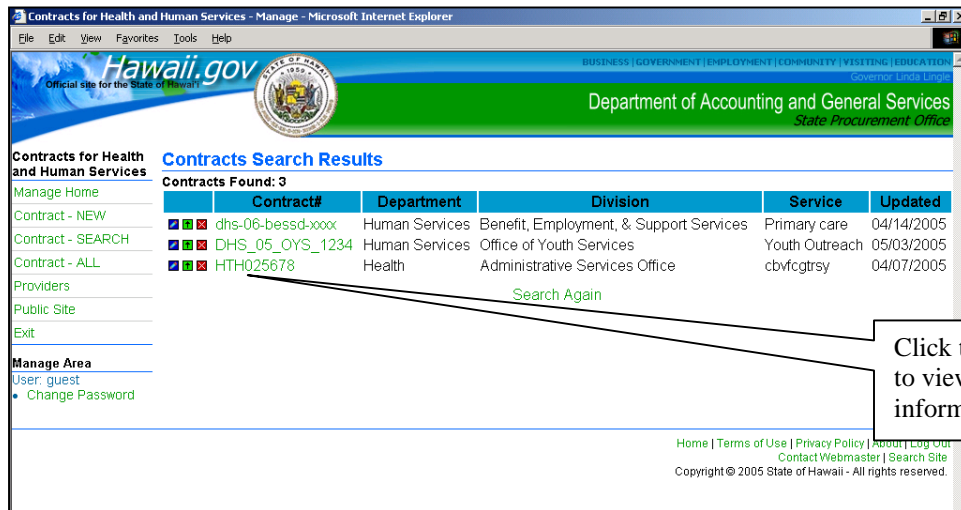
Updating or Editing Contract Information

1. Log in. (See page 4)
2. Click **Manage** under *Contracts for Health and Human Services*. (See page 4.)
3. Click **List all Contracts** or **Search all Contracts** to find the contract to be edited.

Note: When you log in, you will only see contracts entered by your log-in name. If you wish to amend entries made by another staff member in your office who has a different log-in, you must obtain the log-in name and password and log in with them. If the person has left the employment of the office or you are otherwise unable to obtain the log-in and password, contact Corinne Higa or Mara Smith at 587-4706 and 587-4704 (or corinne.y.higa@hawaii.gov and mara.smith@hawaii.gov) respectively.

4. Click the blue edit icon to the left of the contract number.
5. Select the page on which the information to be edited is located.
 - a. Page 1: Contract demographics and general information;
 - b. Page 2: Method of procurement (this will usually not be changed);
 - c. Page 3: Funding information;
 - d. Page 4: Method of compensation and payment, contact information, general comments, contract accomplishments.
6. Review the contract information to ensure the data is correct. There are several ways to do this.

- a. From the page you have edited:
 - i. Near the bottom of the page you will see **skip to page| 1| 2| 3| 4|**, click **4**.
 - ii. Click **Finish**.
 - iii. Click **VIEW**.
- b. From a list of all contracts:
 - i. Click **Contracts – ALL**.
 - ii. Click the contract number.
- c. You may also view the data at the **Public Site**.



(Figure 12 – Editing or Viewing Contract Information)

Hint: Selecting **Contract – ALL** will list all contracts *entered by the user*. Selecting **Contract – SEARCH** will search contracts *entered by the user*. All contracts, including those not entered by the user, can be listed/searched and viewed on the **Public Site**.

Reporting Funding in Subsequent Years

Contracts that are extended in accordance with the RFP and the contract terms shall be reported on the CDRS within 5 working days of execution of the addenda or supplemental agreement or, if there is no addenda needed, within five working days of the start of the fiscal year. It may be reported earlier. The procedure is the same as the previous section on updating or modifying information.

1. Log in. (See page 4.)
2. Click **Manage** under *Contracts for Health and Human Services*. (See page 4.)
3. Click **Contracts – ALL** or **Contracts - SEARCH** to find the contract.
4. Click the blue edit icon next to the contract number.
5. Enter the new **End Date** of the contract, as appropriate.
6. Click **Save and Go to Page 2**.
7. Near the bottom of the page you will see **skip to page |1|2|3|4|**. Click page **3**.

8. To add funding for a new year, click **Add New**.
9. Enter the funding information. (See pages 10-11.)
10. Click **Save**.
11. Click **Log out**.

Reminder: After entering or changing data on a page, click save before moving to the next page.

Reporting Actual Expenditures

Reporting Submittal Deadlines

Actual expenditures for a fiscal year: Within **60** days of the end of the fiscal year.

Actual expenditures at the expiration of a contract: Within **90** days of the expiration of a contract. Reconciliation of actual expenditures for the fiscal year in which a contract ends may take a little longer. Please make every effort to report actual expenditures as soon as possible.

Amending Reported Expenditures: If it is necessary to amend actual expenditures reported on the CDRS, please make a note of the date the expenditures are amended and a brief explanation why in **Comments** for the fiscal year.

1. Log in. (See page 4.)
2. Click **Manage** under *Contracts for Health and Human Services*. (See page 4.)
3. Click **Contracts – ALL** or **Contracts - SEARCH** to find the contract.
4. Click the small blue square next to the contract number.
5. Near the bottom of the page you will see **skip to page 1|2|3|4|**. Click page **3**.
6. Click the blue edit icon next to the fiscal year.
7. Enter actual expenditures by source of funds. Total funds will be calculated for you.
8. Click **Save**.
9. You will see a summary of funds contracted and expenditures for this contract. Review the entry to ensure the data is correct.
10. Problems for which you should check and correct:
 - a. Funds expended for a year exceed funds contracted.
 - i. Amend funds contracted.
 - b. A fiscal year is listed more than once. Usually this will occur when funds expended and funds contracted are listed as separate entries.
 - i. Delete one of the duplicate years.
 - ii. Select the blue edit icon beside the remaining duplicate year.
 - iii. Enter the information that was in the deleted duplicate year.
11. Log out.

Reporting Major Accomplishments of a Contract

Major accomplishments shall be reported no later than 90 days after contract expiration. Major accomplishments may also be reported at the end of a fiscal year. The option is left up to the purchasing agency.


What Must be Reported

Because of the diversity of services and methods of evaluating services, it is left up to each purchasing agency to determine the content and manner in which the accomplishments are reported.

1. Log in. (See page 4.)
2. Click **Manage** under *Contracts for Health and Human Services*. (See page 4.)
3. Click **Contracts – ALL** or **Contracts - SEARCH** to find the contract.
4. Click the blue edit icon next to the contract number.
5. Near the bottom of the page you will see **skip to page 1|2|3|4|**. Click page **4**.
6. In **Significant Accomplishments of this Contract** enter the major accomplishments.
7. Review for grammatical and spelling errors, and to ensure it “makes sense.”
8. If the accomplishments are lengthy, they may be uploaded in an attached file.
 - a. In **Significant Accomplishments of this Contract**, enter “See attached file.”
 - b. Follow instructions for **Uploading Attachments**.

Uploading Attachments

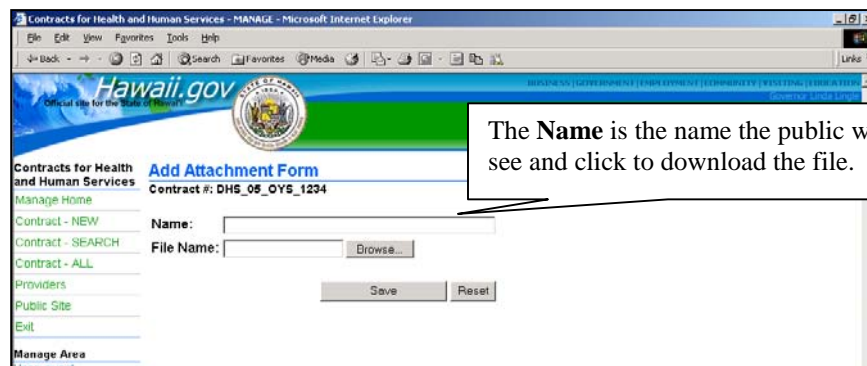
Files may be uploaded to the contracts database for the purposes of giving detailed explanations or clarifications, such in Significant Accomplishments.

1. All attached files shall be in Adobe Acrobat (PDF) format.
2. Reference to an attachment shall be made in the contracts database such as in indicated in the previous section on Significant Accomplishments.
3. Log in. (See page 4.)
4. Click **Contracts – All**. (On the left.)
5. To the left of the contract number select the green upload icon. It is the middle icon with an upwards-pointing arrow.  (See Figure 13.)
6. Click **Add New**. (See Figure 14.)



(Figure 13 – Adding Attachments)

7. Complete the form:
 - a. **Name:** Enter a name.
 - i. This is not the current file name. It is the name the public will see and click to download the attachment.
 - ii. Do not use spaces or unusual characters. You may use underscores.
 - iii. The name should reflect the contents of the attachment (e.g. *accomplishmntsFY05*.)
 - b. **File Name:** This is the file you are uploading.
 - i. Click **Browse** to find the file to be uploaded/attached. (Remember, it must be a PDF file.) The **Choose File** box will open.
 - ii. Find and select the file to be uploaded.
 - iii. Click **Open**. The path and file name will appear in **File Name**.
 - iv. Click **Save**. Note that the file will be assigned a new name.



(Figure 14 – Uploading the File)

- c. Click the green download icon to ensure the correct file has been uploaded.
- d. Log out.

The Public Site

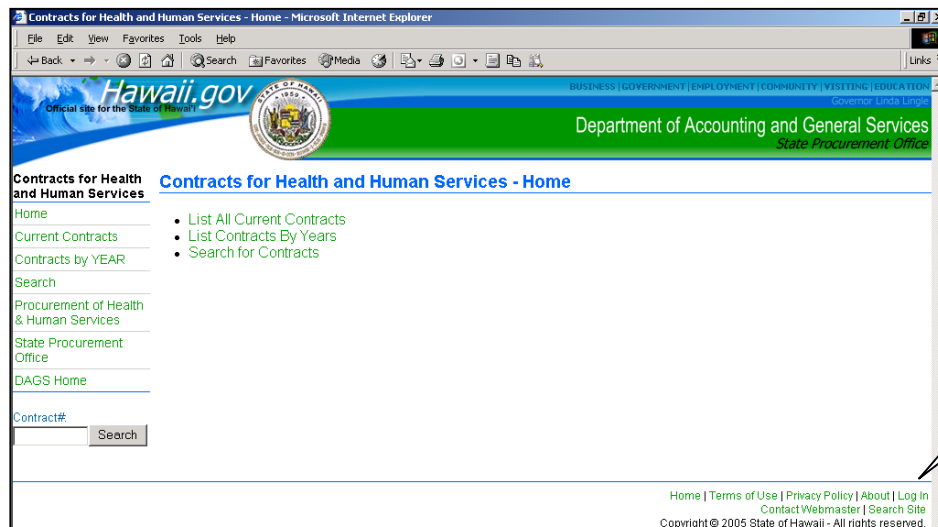
The public site is capable of many kinds of searches. State agencies will find it useful to keep track of current contracts.

FAQ: What is the difference between the public site and where I log in?
 When you log in, you may list, search and sort contracts, similar to the public site. However, you will be searching only those contracts entered by the log-in name. The public site can search all contracts in the database. For instance, if a purchasing agency wishes to list all contracts for a division and there are several users with different user names entering data, the public site can be utilized to provide a listing of all contracts for the division.

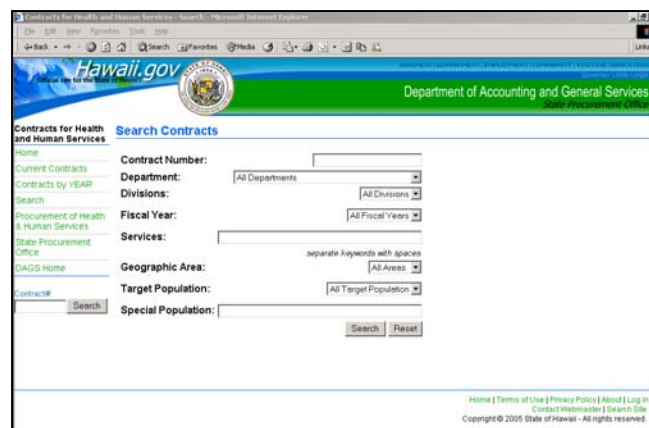
The public site can search the database by any combination of the following:

Contract number	Geographic area
Department	Target population
Division	Special population
Service	Funding for a fiscal year

FYI: You may also log in from anywhere on the public site. The login is at the bottom of the page.



(Figure 15 – The Public Site for the Contracts Database)



(Figure 16 – The Public Site search page for the contracts database)

As you utilize this database you will find more ways it will benefit you in tracking, planning and coordination. Your comments and suggestions for improving the contracts database are welcome. Contact us: Mara Smith at 587-4704 / mara.smith@hawaii.gov or Corinne Higa at 587-4706 / corinne.y.higa@hawaii.gov.

This handbook will be updated as necessary. Check for updates on the SPO website at: www.spo.hawaii.gov > Health and Human Services > For State Agencies.

~~~

Attached to this manual is a CDRS Contract Reporting Worksheet for your convenience. It is not necessary but may be useful if the persons inputting data are not the contract administrators.

~~~

Updates to the Health and Human Services Contracts Database Reporting System (CDRS) Handbook

Date of update	Summary of Changes
4/05	1 st edition of the handbook
10/05	Extended submittal deadline for funds actually expended and accomplishments at close of contract to 60 and 90 (calendar) days respectively to allow time for receipt and review of reports from providers. Method of Procurement-clarification of numbers to be entered. Various minor clarifications of language.